

and cable networks. International sales become the icing on the cake.

In some instances, especially for first-run syndicated shows, a program is created with American and international partners *cofinancing* the production and distribution costs and then splitting the revenue. For example, an American company may team with French and Australian partners. Generally, each coproduction partner retains the rights to the production in its own country or territory. The American partner may retain North American rights, the French company the rights to France and Europe, and the Australian producer the rights throughout the Pacific Rim. Rights in Asia, South America and Africa might be sold to an entirely separate company. The divvying up of rights often depends on the individual clout of the production partners and how much they are contributing to the production, including both money and facilities.

A program may even be shot in one of the partner countries such as Australia and may use talent and production crews from one or more of the countries represented. Sometimes this is done to meet national employment quotas or for nationalistic pride, but more frequently the purpose is to lower production costs. In the United States, we enjoy a high standard of living; we also have high labor and other production costs. Although shooting a series in a country such as Australia may sound exotic, it is usually done primarily with an eye on the bottom line.

Unlike program production in the United States, when shows are produced in other countries for airing in those countries or in the international marketplace, the producers must generally conform to various quotas. Often a country will require that certain percentages of the people employed for the production of a program be citizens of that country. This extends from the stars and other on-camera talent to the behind-the-scenes people, including producers, writers, technicians, wardrobe people, stagehands, secretaries and even drivers.

Quotas of a different sort must also be considered. Many countries regulate the percentage of a program schedule that must originate within that

country, leaving the remaining portion of the schedule that may be made up of programs produced in other countries. For example, the European Union is very restrictive regarding the amount of programming that must contain European content. Furthermore, within a single European country, certain percentages must be created within that nation. In France, for example, not only must a certain percentage of the programs carried on the French network Canal+ be European, but some must also be produced in France. Within the EU, quotas are the same among all European countries, but quotas may be significantly different in other areas of the world.

In the United States, there are no restrictions or quotas whatever regarding either national program origination or employment. American producers are subject only to U.S. labor laws regarding noncitizens.

When a program is produced by or taped in several countries, quotas become even trickier. Selling foreign-produced programs to customers in another country requires consideration of that nation's employment requirements and content quotas, among other things. This is one of the reasons why fewer and fewer American prime-time series are finding their way onto other nations' television screens.

For years, most programming went in one direction: from the United States to other countries. Relatively little programming flowed from other nations into the United States. American dramatic and action shows generally sold best in other countries. Although car crashes, whodunits and prime-time soaps seem to have universal appeal, comedy shows often didn't fare as well. What's a knee slapper or rib tickler in one part of the globe may not seem so funny in other areas.

American movies have long been popular in most other countries. During the 1980s and 1990s, the Hollywood studios increasingly made *output deals* in which substantial amounts of programming from a studio were sold in advance in other countries. This helped to finance the production costs of the shows and to give relative assurance that a program actually would be produced. Some people have dubbed this period the Golden Age of Export.

The birth of new broadcast and cable networks in the United States and throughout the world in the 1980s and 1990s created a tremendous demand for fresh programming. The rise of the FOX network had enormous impact not only in the United States but also around the world. FOX programs such as *Beverly Hills 90210* and *The Simpsons* became so popular in other countries that they became *global brands*, much like Nike and Microsoft.

Many American cable networks have also become global brands. MTV has cable networks in many areas of the world programmed in the languages of the local countries. The Discovery Channel is also global, with localized programming in Africa, Asia, Europe, Latin America and the Middle East as well as in individual countries, including Australia, Brazil, Canada, Germany, Italy and India. Fox Kids Network, E! and TNT are also seen in many countries. And CNN is the original worldwide network, viewed around the globe since the 1980s.

Global branding has become commonplace in broadcast and cable circles. Often branding goes far beyond an individual program or character (see 6.11).

The Emerging Pattern

As the twenty-first century began, an extremely significant change occurred in the international marketplace. With deregulation and a single monetary standard sweeping Europe, there was a desire for strong locally-produced programming coupled with an ability to export such programming—to America among other places. As a result, *format programming* emerged as a dominant trend. (Formatting is essentially the same as franchising.) And unfortunately, we then saw the end of the Golden Age.

To understand format programming, think of *Wheel of Fortune* and *Who Wants to Be a Millionaire?*. Both programs were created in one country (*Wheel* by producer Merv Griffin and syndicator King World Productions in the United States, *Millionaire* by producer Michael Davies and the BBC in England). In each case, the format is licensed to broadcasters in other countries. Many of the

6.11 Global Branding by Nickelodeon

Nickelodeon has created branded blocks of programming both for its own international services and for sale to other companies in countries where Nick does not have its own operations. Nickelodeon provides not only several hours of the programs themselves but also interstitial materials such as promos and IDs and website content. As a further extension of branding and its image, Nickelodeon also licenses ancillary rights and services. Included are product licensing and merchandising (toys and games), video and audio products (CDs, videocassettes and DVDs), and publishing rights (books and magazines). Like many other companies, Nickelodeon believes its trademark is valuable, and it carefully guards the environment in which its programming and image are presented around the world.

As communications shrink the world, programs and program concepts are becoming both more global and more utilized. For example, Nickelodeon created *Rugrats* as a U.S. cable program. The show has since been aired around the world. In Great Britain alone, *Rugrats* can be seen on the BBC (the British Broadcasting Corporation's terrestrial broadcast network), Nick UK (basic cable and direct broadcast satellite) and Nick Replay (digital TV). With an eye to the future, when Nickelodeon develops programs or acquires program rights, their programmers attempt to do so for all Nickelodeon venues (Nick US, Nick UK, Nick Australia and so on). Such strategy is not unique to Nickelodeon; indeed, many multinational companies employ the same approach.

production elements (scripts, music, scenery design, sound effects, questions and so on) are provided by the program creators, but local hosts and contestants are used in each country. Scripts are tailored to local interests, habits and language (the American word *cookie* would be changed to *biscuit* in England, for example).

Even the name may be changed to reflect local culture and language. (For example, the most popular syndicated show in the United States is still called

Wheel of Fortune in Australia, but its name becomes *Roda a Roda* in Brazil, *La Ruleta de la Fortuna* in Ecuador, *Glücksrad* in Germany, *Roda Impian* in Malaysia, *Carkifelek* in Turkey, and *Chiếc nòn k'ý diêu* in Viet Nam. And *Jeopardy!* becomes *Your Own Game* [in Russian].)

In some cases, actual video portions of the program may be supplied. (For its preschool program *Blues Clues*, Nickelodeon provided all the animation; the various international broadcasters then chromakeyed their own local live actors over the animation.) Perhaps most important, the shows are produced in the local languages. Thus, *Wheel* has its own British Pat Sajak and successors to the classic Vanna White. Meanwhile, the British host of *Millionaire* was replaced by Regis Philbin in this country. Both shows air in Japan with Japanese hosts, in France with French hosts and so forth.

Format programming has tremendously affected international syndication. What had been pretty much a one-way flow of programs from the United States to other countries has been abruptly changed. *Product flow from Europe to the United States and other countries is now the largest ever.* This phenomenon has resulted in vast new creative and sales potential.

What Lies Ahead for Syndication

Syndication is a rapidly changing business. Headlines in trade publications frequently herald new and innovative syndication deals. Although it is speculative at best to imagine how the industry might look by the end of this decade, several scenarios are plausible.

1. Innovative deal structuring. As the financial stakes get higher and competition becomes fiercer, syndicators and stations alike will become more and more creative in their deal making. Broadcast syndicators will make offers more attractive to stations while simultaneously finding new ways to increase revenue to their own bottom line. This may involve barter, payout, additional daily or weekend runs, sharing use with cable, cofinancing

with station groups, hiatus periods and ancillary revenue sources. Deal structure will be limited only by the ingenuity of the participants and will be driven by the need to maximize profits for both syndicators and stations.

2. Cost control. Stations and syndicators are continually striving to manage costs. The days of heady economic growth and comfortable profits between the 1970s and early 1990s seem only a pleasant memory in the 2000s. In the wake of new competition from cable and the softening of the world economy, costs must be controlled. Therefore, whether in deal making, station operation or expansion of facilities or staffs, broadcasters and syndicators alike share a common goal: the need for efficiency, streamlining, mutually beneficial dealing and use of all assets. With FCC regulations allowing ownership of more stations by each individual broadcasting company, and with mergers of many syndicators, cost controls become ever more important, even as the programming deals are becoming bigger.

3. Consortiums/coproduction/co-ventures. All these terms mean much the same thing: Station groups and syndicators are increasingly finding new and exciting ways to work together as partners. Spurred by tough economic times and the need to control costs, station groups and syndicators can share costs and risks and, perhaps, profits. Station groups will continue to join forces with one another in noncompeting markets to develop and launch first-run programs to meet specific station needs. Increasingly, syndicators will join in these co-ventures. Because stations will hold an equity position in some shows, these shows will probably gain some extra promotion and perhaps be given a longer time on the air to prove themselves. In other words, coproduced shows will get a good shot at succeeding (if the audience likes them!).

4. Cable, internet and mobile media. Increasingly, programs created for original telecast via one delivery system are finding their way to another: over-the-air to cable and vice versa; network to either broadcast syndication or cable; cable to syndication; cable to foreign; foreign to domestic syndication.

And the internet and various mobile media will become increasing parts of these aftermarkets. Several crisscrossing paths already exist, and the line between network/syndication/cable is now blurring. In fact, the broadcast networks routinely promote their cable programs on network shows airing on local affiliates; talent is frequently utilized for both network and cable telecasts. As cable has grown and solidified its economic base, syndicators have played to that strength. Once traditional adversaries, now cable and broadcast have formed co-ventures that will benefit both. Just as politics make strange bedfellows, so too do the economic needs of the television industry.

The internet and mobile media have rapidly become the next challenges for broadcasters, syndicators and networks. Although the internet and smart phones offer great opportunities for extending program and product reach and for promoting a program or an entire brand, they also create huge challenges—even threats. Decisions must be made on how to sell a program on the internet and to mobile media, how to charge, and how to protect a copyright. Once a program or portion of a program is on the internet, it essentially becomes available to any person or company in the entire world. The owners of the program and the content copyright need to figure out how to protect their financial and other interests. Producers usually make programs because of their enormous revenue potential from domestic and international syndication, and the syndication process involves hundreds of millions of dollars annually across the United States. The rise of the internet and mobile media potentially challenges all these assumptions.

5. Increasing role of reps. Programmers at station representative firms will play an even greater role in the syndication process. As costs escalate and programming decisions become riskier, the rep programmer's expertise becomes more valuable. To control costs, many stations have eliminated the program director position and are using rep programmers instead. This trend is likely to continue.

6. Increasing role of networks. With the demise of the FCC's financial and syndication rules, the

networks have become actively involved with the production of syndicated shows. Many expect the prime-access period (7 to 8 P.M. EST) to attract more off-network programs now that the Prime-Time Access Rule (PTAR) is long gone. First-run game shows and magazine formats have outlived their protected existence in the top 50 markets. Increased competition for hit off-network programs will affect the price for these shows.

Just as the children and teenagers of the 1950s and 1960s grew up watching *I Love Lucy*, *The Flintstones* and *The Brady Bunch*, so too the next generation found enduring favorites in *The Cosby Show*, *The Simpsons* and *Married ... with Children*. Today's teens and adults expect police departments to conduct advanced crime-scene investigation because they watched so many episodes of *CSI*, *Without a Trace*, *Cold Case* and their clones. This generation has taken *Ugly Betty* and *Grey's Anatomy* into their lives. Television shows are valuable assets that can enjoy a long economic lifespan. Old favorites in broadcast syndication continue to play and play and play. And the needs of cable have extended the life of many seemingly lesser programs, while the internet offers worldwide opportunities to unknown producers.

While sitcoms are still important in syndication, hour-long network dramas generally are not as desirable for television stations because it is harder to find one-hour blocks of time on stations that will reach large audiences (outside of prime time—it's named that for the obvious reason). Also, because many hour-long shows tend to be serial in nature (*Grey's Anatomy*, *24*, *Lost*), once the outcome is known from the original network run, the dramatic tension and viewer interest surrounding these programs tend to lessen. Their network rerun ratings are generally considerably lower than their original run rating, foretelling potential lower ratings in syndication. First-run series, on the other hand, draw viewers who are more likely to watch live, thus using DVRs less, which results in greater viewing of commercials.

Some of these hour programs may be sold in syndication as once-a-week hours for weekend runs, while others are sold directly to cable networks following their over-the-air network runs. Other

hours (such as *Law & Order* and *CSI*) are sold directly to cable networks, bypassing syndication. For the rights holders, the lack of domestic syndication potential is often offset by sales to international buyers for broadcast in other countries.

The Peter Allen song “Everything Old Is New Again” at one time applied to the syndication potential of most programs going directly to television stations. Nowadays, especially with the rapid growth of cable and online networks plus tablets, program producers have many more potential buyers for programs when they finish their originals runs on network television. If only enough advertisers would catch up to pay for the game.

Notes

1. In the media business, a *station group* is made up of television stations in two or more different markets owned by one company, and relaxed FCC cross-ownership rules now sometimes permit a single company to own two stations within some larger markets.
2. FireWire, also called i.Link and Lynx, is Apple’s standard for high-speed data transfer to computers (like USB). The system is copyrighted and fees are high, so FireWire is used by the television industry but not the general public.
- Known technically as IEEE 1394, the descriptively-named FireWire system provides high-definition audio/video connections for speedy transfer of such programming as syndicated series episodes and movies. As you can imagine, “emailing” a whole movie or two dozen episodes necessitates high-quality and high-speed capacity.
3. A few shows move the other direction. The game show *Remote Control* went from cable to broadcast syndication, the first of a new stream of programs for the syndication market.
4. In cases where the rep is negative toward the program, avoiding an in-person pitch to reps generally has the advantage of minimizing the strength of the rep’s recommendation to stations. Opinions tend to be stronger about shows that have been evaluated firsthand. Reps eventually see pilots or sample tapes of all shows their client stations are interested in, but delay sometimes works to the temporary advantage of the syndicator.
5. Barter splits may vary widely, even among essentially similar programs. For example, *Jerry Springer*, *Oprah* and *Jenny Jones* are all cash-plus-barter, one-hour talk-show strips, but the national/local barter splits are quite different, with *Jenny Jones*’s syndicator having considerably more national time to sell than *Jerry Springer*’s distribution company: *Jerry Springer*, 2:30N/12:00L; *Oprah*, 3:00N/11:00L; *Jenny Jones*, 3:30N/10:30L.
6. Troy Dreier, “Syndicate of Die,” <http://www.streamingmedia.com/Articles/Editorial/Featured-Articles/Syndicate-or-Die-65694.aspx>.

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Non-Prime-Time Network Programming

Robert V. Bellamy and James R. Walker

Chapter Outline

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Soap Operas
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The Effects of Consolidation and Cable

Note

The migration of television audiences away from the big broadcast networks to the ever-increasing number of alternative video outlets has greatly accelerated in the last five years—a phenomenon that won't be a surprise to you! As Chapter 2 pointed out, even a cursory glance at prime-time schedules shows that network TV has struggled in its attempts to reach and maintain audiences with value to advertisers. Similar pressures have come to major segments of non-prime-time. *In fact, network Monday–Friday daytime programming has experienced some of the most radical changes of all: The iconic soap opera format now is rapidly fading away, and more and more time slots are being returned to affiliates (who hardly know what to do with them). Talk programs have become indistinguishable from syndicated offerings and make up more and more of what is left of daytime network programming.*

For the popular media, *prime-time* television is television. Much of national and local coverage of television focuses on evening programs. Critical reviews, star interviews and Nielsen ratings for the top prime-time programs are readily available. Because prime time is the subject of such intense reporting, you might think the rest of the day is insignificant. Not true. Daytime talk and late-night comedy are frequently the most provocative and—significantly for the U.S. broadcast networks—*most profitable* shows on television. *The difference between what a program costs to produce and the advertising revenue it generates is its profit.* Because non-prime-time programs are generally inexpensive to produce and carry more ads than prime time, their ratings can be relatively modest and still supply huge profits for the networks. In addition, non-prime-time audiences are less demographically diverse, making it easier for advertisers to target their commercials to consumers most interested in their products. This means more compatibility between a program and its spots (less viewer annoyance) and less advertising waste (fewer commercials directed to wrong viewers) than in prime time with its larger but more diverse audiences.

Nonprime-time viewers are often more loyal to their programs than prime-time viewers. Many

football fans plan their whole week around Saturday college and Sunday professional games, and the network programmer who preempts a weekday soap opera or *The View* for a special program will receive an avalanche of unpleasant tweets and emails. Despite steadily decreasing audiences, millions of Americans still use network evening news as a daily information ritual, and Letterman or Leno as a daily bedtime ritual.

Networks generating the largest advertising revenues have the most non-prime-time programming. Programmers cannot ignore the non-evening programs because there are many more hours to program than in prime time. More than any other type of programming, the non-prime period distinguishes the oldest broadcast networks (ABC, CBS, NBC) from their more recent competitors. The long-established presence of the Big Three in virtually all nonprime dayparts provides them with heaps of commercial availabilities to sell to advertisers. ABC, CBS, and NBC each sells more than three times as many commercial minutes as FOX, the most active of the other English-language networks.

The primary reason for this vast disparity in the networks' most basic product, *advertising availabilities*, is that the newer networks take a different approach to nonprime-time programming. With the important exceptions of sports on FOX, newer networks have not competed successfully in nonprime time. Instead of challenging long-running programs in early morning, daytime, and late night, the CW and MNTV try to capture viewers' attention in prime time, while ION strips older family-oriented reality shows. Univision, by contrast, successfully fills many of its nonprime hours with talk shows and *telenovelas* (television novels similar to soap operas, but with a definite ending after some months or years) and carries major international sports on weekends.

NonPrime-Time Dayparts

Nonprime time is a broad term encompassing all the programming dayparts other than prime time. The U.S. broadcast television networks program some or

all of the following dayparts (reflected in eastern/Pacific times) with several types of programming.

Weekday Programming

Overnight	2:05 A.M.–6 A.M. News
Early morning	6 A.M.–9 A.M. Magazine
Daytime	10 A.M.–4 P.M. Soaps/Game shows/Talk
Early fringe	4 P.M.–6 P.M. Children's*
Early evening	6:30 P.M.–7 P.M. News
Late night	11:35 P.M.–2:05 A.M. Talk/news

*Daytime children's programming has been abandoned by all the major English-language networks in recent years. This is another example of how niche-oriented cable networks (e.g., Disney Channel, Nickelodeon) have replaced one of the traditional functions of broadcast television.

Weekend Programming

Weekend mornings	8 A.M.–1 P.M. Children's/Magazine
Weekend afternoons	1 P.M.–7 P.M. Sports
Weekend late night	11 P.M.–1 A.M. Comedy/Music

The size of the audiences in non-prime dayparts is considerably smaller than in prime time, but all

nonprime-time dayparts contribute competitively and economically to a network's performance. Programming executives responsible for nonprime dayparts are as dedicated to competing for available viewers as are their evening counterparts. In prime-time programming, the "war" fought night after night is measured in daily ratings gains or losses. Although daily ratings are important to shows in nonprime time, the key to the battle is to get viewers into the habit of watching weekday nonprime programs every day or from week to week. With the exception of Univision's *Sabado Gigante*, all ten of the longest-running programs on the networks are non-prime series (see 7.1).

In *prime time*, ratings for the Big Four broadcast networks average between approximately 2.0 and 8.0 nowadays and range from about a 1.5 at the bottom end to about 8.0 or occasionally higher for top-rated shows in the key Adults 18 to 49 demographic. This huge variation means sharp differences in the prime-time advertising rates and profit ratios for the networks. For *daytime*, the average is between 2.5 and 3.0 with a range from 2.0 to 3.5, a quite different ball game. Although the revenues generated are more modest, the risks are also

7.1 Longest-Running Network Series

Top 10 Longest-Running Programs as of 2011*

	Years on the Air
1. <i>Meet the Press</i> , NBC (premiered 1947)	64
2. <i>CBS Evening News</i> (premiered 1948)	63
3. <i>The Today Show</i> , NBC (premiered 1952)	59
4. <i>Face the Nation</i> , CBS (premiered 1954)	59
5. <i>The Tonight Show</i> , NBC (premiered 1954)	57
6. <i>General Hospital</i> , ABC (premiered 1963)	48
7. <i>The Price Is Right</i> , NBC, ABC, CBS (1956–65, returned 1972)**	48
8. <i>Days of Our Lives</i> , NBC (premiered 1965)	46
9. <i>NBC Nightly News</i> (premiered 1970)***	41
10. <i>The Young and the Restless</i> , CBS (premiered 1973)	38

**Sabado Gigante* has been on the air 49 years (since 1962), but the first 24 were on a local South American channel; it has been a network show on Univision for 26 years.

**While in syndication, *The Price Is Right* had a concurrent prime-time run from 1956 to 1964 and two brief runs on prime time in 1986 and 1993.

***NBC, starting with *The Camel News Caravan* (1948–56) and then *The Huntley-Brinkley Report* (1956–70) to the present *NBC Nightly News* (1970–), has had an evening newscast on the air continuously for 63 years.

more modest. Nonprime programmers use a low-risk approach when building their schedules.

Using a low-risk programming strategy, programmers concede that blockbuster ratings and their accompanying high advertising rates are virtually impossible to attain. They take a more conservative approach, which limits production costs and uses tried-and-true formats. In addition, developing a schedule using a different series every hour of each weekday would be far too expensive—by a long shot. Thus, weekday programming is *stripped* (the same programs are scheduled on Monday through Friday at the same time). *Stripping allows viewers to build ongoing loyalty to a series while lowering the financial risks involved in program development.* To program effectively in nonprime time, the networks must assess the available audience in a particular part of the day. To do this, programmers examine HUT levels, clearances, potential advertisers and likely demographics of audience members.

Scheduling Strategies

Scheduling nonprime time presents a unique set of challenges for programmers. The programmer juggles two types of audience flow: *flow-through* from the first program to the second one in the daypart and *flow across* the weekdays from one day to the next. Flow-through is usually accomplished by using blocks of similar shows; flow across the weekdays is promoted by stripping a series in the same time slot each weekday. While we commonly see blocks of soaps or game shows on TV, late night is blocked too: a late-night talk show is usually followed by another late-late talk show. For news, talk and magazine programs, continuity comes from the regular presence of a familiar anchor or host that promotes flow from one day to the next. Also, such program genres as soap operas have a cliff-hanger narrative structure that connects each episode with the next day's episode, driving flow across days.

In contrast, weekend programming is scheduled *weekly*—like prime time—with one episode per week at the same time from week to week. Viewers return each Saturday or Sunday to get programming

that is less available on networks during the rest of the week, such as sports, comedy, music or extended news interviews. Viewers of Sunday morning political talk, for example, typically return week after week to keep up, and fans of a particular NFL team will religiously tune in every Sunday afternoon to see their favorite.

HUT Levels

HUT levels reach around 60 percent in prime time, while nonprime-time levels can be less than 10 percent. Because so few homes are using their television sets (or home computers), the potential ratings and advertising revenue are limited. But the opportunity to create a winning franchise for a time period remains: Even small audiences have value to advertisers. In fact, many clients cannot afford to advertise in prime time, so creative programming targeted to the “right” small audience is often very attractive to these sponsors. Weekends are a good example. Viewers who tune in on the weekend have a different mindset than prime-time viewers do. They often want more movies or sports than they have time to watch during prime time. *Longer chunks of leisure time can offset smaller HUT levels: Weekend viewers wind up spending more time watching television, despite their smaller numbers.*

The Struggle for Clearances

Nonprime time and prime time especially differ in the crucial matter of affiliate clearances. When a network schedules a program, an affiliated station has three options: It can clear the program (air it when scheduled by the network), it can decide not to clear it (preemption), or it can ask permission to air the program at a later time (delayed carriage). *Both preemption and delayed carriage, especially by major-market stations, hurt a network's national ratings because they reduce the potential audience for the program.* In order to increase clearances of network programming, especially in nonprime time, the networks succeeded in getting the FCC to raise the percentage of U.S. households they can reach with their owned-and-operated stations. Although most affiliates clear

about 90 percent of their network's total schedule, the percentage in nonprime time, especially in the daytime, Sunday morning, overnight and late-night dayparts, is substantially lower. The O&Os naturally clear the entire network schedule.

In a surprising move after nearly 50 years of daytime programming, around the turn of the century, NBC (which ranked third in daytime programming throughout the 1980s and early 1990s) decided to scale back its daytime schedule because of low clearances. When NBC first offered *The Other Side*, a daytime talk show, it received only a 61 percent clearance rate; in other words, almost 40 percent of NBC's affiliates decided to schedule some syndicated series instead. *Besides eroding its potential audience, preemption and delayed carriage disrupt the scheduling strategies used to foster audience flow from one program to another.* For example, an ABC affiliate that carries *Nightline* following the local newscast provides a stream of viewers who are looking for information. When *Nightline* is delayed to allow the affiliate to carry a sitcom, much of the potential audience goes to bed or switches to an all-news cable channel. The delayed *Nightline* is less likely to attract a large audience when it follows comedy rather than news.

The corporate owners of the broadcast networks are also hedging their nonprime-time bets by offering programming to their own and other network affiliates through their syndication arms. Viacom, owner of CBS, also owns King World, the syndicators of former daytime powerhouse *Oprah* and its popular spinoffs, *Dr. Phil* and *Dr. Oz*. When affiliates of ABC or NBC purchase these talk programs, the shows compete with whatever CBS affiliates offer, a situation that more than irks CBS affiliates.

Advertisers and Demographics

A network has to determine which segment of the available audience it will go after (*target*), mindful of its competitors' programming and influenced to some degree by advertiser support for its programming. Then the network programmer's task is to put

together a schedule of programs that will, at the lowest possible cost, do four big things:

- Attract the most desirable demographic groups
- Maximize audience flow-through
- Build viewer loyalty
- Capture the largest possible audience

One big difference between the major dayparts is that audiences during nonprime-time dayparts are more *homogenous* (similar in demographic composition) than prime-time audiences. Typically in nonprime time, the three networks schedule the same program type head-to-head (all soaps, all talk, all games, all soft news and so on), which creates fierce competition for single audience group. When selecting the shows for a particular daypart, the networks necessarily give primary consideration to these elements:

- Demographics of available audiences
- Competitive counterprogramming opportunities
- Economic viability

The questions are whether an audience group is large enough to split profitably, whether there is a chance to capture another big group, and what the cheapest option is that will still please enough advertisers.

Indirect influences on programming practices also come into play. Daytime programs rely on drug and food companies for advertising revenue. Hence, programmers are wary of scripts or interview programs that tackle subjects such as tampering with painkillers or rat hairs in cereal. For three reasons, *daytime programming is in much closer touch with its advertising messages than prime time.* First, daytime programs contain more commercial minutes per hour. Second, because many programs were once both sponsored and produced by advertisers, there is a tradition of sensitivity to advertiser needs. Finally, two major companies, General Foods and Procter & Gamble, dominate the advertising time in daytime, and until very recently, the networks could not afford to offend them. (Now most networks are owned by even bigger guys.)

Genres of NonPrime-Time Programming

There are seven key genres of nonprime programming: (1) sports, (2) daytime soap operas (including telenovelas that also air in prime time), (3) game shows, (4) news/magazines, (5) talk shows, (6) children's programs and (7) comedy/music programs. Most of these program types are identified with particular dayparts: sports with weekend afternoons; soaps and game shows with daytime; children's programming with Saturday mornings; talk/comedy shows with weekday late night; and comedy/music with late nights on Saturdays. Different strategies and practices necessarily associate with each genre of programming, as well as different levels of cost, and the development processes for new shows vary considerably. Not all of these categories are mutually exclusive. For example, the third and fourth hours of *Today* are as much a talk program as they are a news/magazine. *The View* and *The Talk* are talk programs (duh) but include interviews with newsmakers like the news/magazines. In addition, ABC schedules the cheap-to-produce reality genre in daytime (and prime time)-most recently, *The Chew* and *The Revolution*.

Sports

In case you haven't noticed, on the broadcast networks, weekend afternoons (1 to 7 P.M.) are dominated by live sports coverage, and they are allowed to run on into the once-sacred prime time if the events are popular. *Sports are indubitably one of the most important forms of programming in television.* One of the chief reasons for sports' popularity with the network higher-ups is their consistent ability to attract an audience of young men who are extremely difficult to attract with other types of regularly scheduled programming (duh). In addition, sports provide a much-valued location for zap-proof advertising and promotion. Sports telecasts are brimming with opportunities for the insertion of ads, promotional spots and announcements that cannot be avoided by the viewer unless she or he

also risks missing part of the action. Sports also are one of the programming forms that provide excellent branding opportunities for networks, such as "NBC—The Home of the Olympics," *FOX NFL Sunday* and so forth.

A network's sports division is responsible for acquiring the rights to games and events and for producing the telecasts. It must work closely with the programming division because of the complexities associated with live sporting events, including overtime pay and weather-related cancellations. The networks' sports divisions negotiate with the sports leagues to guarantee that start times occur when the majority of viewers can watch. Those sporting events that do not attract a prime-time-sized audience are carefully scheduled elsewhere so as not to interfere with the all-important prime-time entertainment programs.

Noninterference with prime time diminished as a concern in recent years, however, because of the rising popularity and enormous cost of major team sports, particularly football. The late afternoon NFL games and even post-game programs regularly run into Sunday prime time and often contribute to high prime-time ratings, bumping *60 Minutes* and other Sunday shows. NBA (National Basketball Association), MLB (Major League Baseball), and NCAA (National Collegiate Athletic Association) playoff games now regularly appear in prime hours. When Disney shifted ABC's *Monday Night Football* to its ESPN cable network because of declining ratings, NBC promptly filled the prime-time broadcast NFL void with *Sunday Night Football* while re-branding Sunday night prime time as *Football Night in America*. Most regular season team sports coverage remains in weekend afternoons and early evenings (and on cable), while most major postseason contests are featured in prime time.

Sports Programming in a Multichannel Environment

Although major sports are not the low-cost programming option they were in the early days of television, *programming costs are always relative in*

television. Although CBS claimed to have lost millions of dollars on sports rights in the early and mid-1990s, within a few years the network once again spent enormous sums to regain a piece of the NFL Sunday afternoon package and to renew its NCAA Men's Basketball Tournament coverage. This occurred after the network's prestige was seriously damaged by its loss of the NFL to the less-established network in 1994.

FOX used the NFL and later MLB, NASCAR (National Association for Stock Car Auto Racing), and, to a limited degree, the NHL (National Hockey League) to establish itself as a legitimate member of the Big Four to both viewers and the financial community. One result of FOX's new leverage was its ability to upgrade its affiliates in several markets, mainly at the expense of CBS. The question of cost, then, involves more than simply the profit or loss made from the ratio of program costs to advertising revenues: *Losing major sports can undermine the legitimacy and degrade the financial value of a broadcast network.*

Cable has clearly had a huge impact on televised sports programming. Networks such as ESPN, ESPN2, ESPNU, Versus (VS) and the regional Comcast Sports, Fox Sports and Root Sports Nets exist only because of their sports coverage. *Cable's saturation coverage has raised the profile and value of sports on television, even as it drains ratings from broadcast networks for all sports but the NFL.* Only the NFL has consistent increases in regular-season ratings—at a time when most other broadcast network ratings are declining. ESPN, for example, now pays the NFL more per year (\$ 1.1 billion) for *Monday Night Football* than any of the Big Four broadcast networks pay for their Sunday afternoon (CBS, FOX) or Sunday night (NBC) packages. Although network sports ratings, like the ratings for all other network programming, have had some attrition in the wake of cable and internet competition, the falloff is much less than that of other program genres. In fact, ratings for the NFL, NBA and even the NHL have recently increased while the ratings for MLB, NASCAR and other events have remained stable in the last few years. *An important point is that even the limited*

ratings attrition for sports is offset by sports' increased value as one of the few programming types that attract the male audience so valued by advertisers, in spite of ever-proliferating entertainment options. In addition, such high-profile events as the Super Bowl, the Olympics and the World Series continue to draw enormous audiences and provide substantial promotional opportunities for the host networks at critical times of the year (the February sweeps and early in the new broadcast season).

The solution to the tug-of-war over sports has been for broadcast networks to partner with cable networks to share rights to sports programming. The most prominent examples are Disney's ownership of both ABC and the ESPN networks, which have shared NFL, NBA and NHL packages; the FOX/Fox Sports Net combination, which shares MLB; and the more recent Comcast/NBC merger, which shares the NHL and is likely to become a more aggressive bidder for sports to feed both the network and Comcast's numerous Regional Sports Networks (RSNs). Cable networks are able to offer most of the near-daily regular season games, leaving broadcast networks to focus on the postseason and key regular season contests.

There are also shared rights arrangements among separate companies where early rounds of team playoffs and golf and tennis matches appear on cable networks, with later rounds shifting to networks. The split of NBA between ESPN and ABC is another example of leveraging the value of sports television. In fact, the sports divisions of ABC and ESPN have been merged and now operate in tandem more often than they operate as competitors.

The sports anthology program, exemplified by ABC's long-running *Wide World of Sports*, was a casualty of the changes in sports television.¹ The minor sports that were typically covered by anthologies have, for the most part, benefited from the explosion in televised sports by gaining individual contracts on broadcast or cable (NASCAR, WNBA and Major League Soccer). There has been a redefinition of what constitutes a successful program: now there is more emphasis on the "quality" than the quantity of ratings. This situation has enabled NASCAR to gain lucrative network television

7.2 Nascar on Television

Almost \$4.5 billion. That's the price FOX, ABC/ESPN and TNT paid to carry NASCAR races for the eight years that started in 2007. The deal's hefty tag recognized NASCAR's high television ratings as the second most-watched sports programming after the National Football League. Among its most valuable assets are the Nextel Cup races.

Starting in the 1960s, ABC aired NASCAR races as part of its *Wide World of Sports* program, and after two decades, shifted NASCAR off broadcasting and onto cable (ESPN), a relationship that lasted another 20 years. ESPN is widely credited for popularizing NASCAR—so much so, indeed, that at the turn of the century, NBC and FOX snapped it up—but unexpectedly, the ratings slid in mid-decade. The slide led to the creation of the “Chase for the Nextel Cup,” an end-of-season playoff series in which only the top ten drivers were eligible for the final ten races. These races energized the entire season and attracted

much larger audiences, taking NASCAR to the No. 2 spot. When NBC decided not to renew NASCAR's contract in 2005, ABC/ESPN jumped at the opportunity to air the races again, agreeing to pay an estimated \$270 million to air 17 Nextel Cup races (the remaining races were split among broadcasting and cable outlets).

NASCAR is widely popular, but whether ABC/ESPN's investment will pay off over that long a haul remains to be seen. Competition from the NFL is hard to beat. NASCAR ratings have also been sagging, including double-digit dives in the 2009 and 2010 seasons. NASCAR officials and network executives “study the reasons” for the drop, but many journalists blame a clash between race times and NFL games, colorless story lines about the drivers, and the spacing and timing of the many, many commercial breaks.

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contracts (see 7.2). *The “a little something for everybody” approach of sports anthologies is less viable as a means of keeping program audiences in the multichannel environment because it virtually encourages channel changing.*

The idea of multiple sports in one program lives on in the biannual Olympic Games and the various X Games (the “extreme” sports that have a particular appeal to young audiences). Although the Olympics cannot be regularly scheduled in a conventional sense, the 1992 decision of the International Olympic Committee (IOC) to have the Summer and Winter Games alternate every two years enormously increased the value of the games to television. NBC, in fact, gave up competing for rights to the NFL, MLB and NBA in the mid-1990s in favor of the lower-cost NASCAR and, even more important, in favor of branding itself as the “Network of the Olympics.” ABC Sports had used this same branding strategy with great success to build its ratings and credibility in the 1960s and 1970s, and NBC has succeeded in tying itself to all Olympics in the public's mind. (Some people are surprised to hear that any other network ever carried the Olympics.)

With the Winter Games scheduled in the February sweeps and the Summer Games coming right before the fall season rollout two years apart, the various Olympic events provide hundreds of hours of prime-time and nonprime programming and also supply a key promotional platform for touting NBC's other programming. The Olympics were also the first major experiment with *multiplatform programming*, a practice that has now become standard for the Olympics and other long-season sports while stimulating the new media by providing highly visible and valued content.

Non-Live-Event Sports Programming

Non-live-event sports programming on the networks today generally consists of (1) pregame and postgame programs and (2) sports-league-produced programming for children and young adults. Since the success of CBS's *The NFL Today* in the 1970s, broadcast and cable networks have developed similar shows for other sports. *These wraparound shows help networks to more fully brand programming blocks and expand the programming hours devoted*

7.3 Mister Olympic Broadcasting

Duncan “Dick” Ebersol is best known for producing large-scale events, most notably the Olympic Games. Long an American television executive, his career began at ABC Sports where, mentored by Roone Arledge, he became the first-ever television Olympic researcher. In the mid-70s, he moved to NBC and created such enduring successes as *Saturday Night Live* and *Friday Night Videos*, as well as *Later with Bob Costas*, under his own independent production company.

In 1989, Ebersol returned to NBC to become the president of NBC Sports. He immediately negotiated the acquisition of the rights to broadcast the NBA, and in the following years brought the NFL, MLB and Nascar under the NBC umbrella. His most influential decision, however, was to turn NBC into “The Home of the Olympics” in the USA. In 1993, he secured the rights to the 1996 Atlanta Summer Olympics (the 1988 Seoul and 1992 Barcelona Games had been acquired before his arrival at the network). This was the first of several record-breaking contracts that would bring the broadcaster every summer and winter Olympics between 2000 and 2012.

Under Dick Ebersol’s guidance, NBC effectively became the biggest single sponsor of the Olympic Movement (the International Olympic Committee and the organizations it

coordinates). Broadcast rights add up to half of the entire revenue generated by the movement, and NBC alone contributed \$820 million to the \$1.28 billion collected from broadcasters of the 2010 Vancouver Olympics. This massive role gives the network some influence on the scheduling of Olympic events. For example, in the 2008 Beijing Games, in contrast to past practice, swimming finals were scheduled in the morning sessions to allow NBC to broadcast them live in prime-time, rather than in tape delay due to the time zone offset. In addition, the network expanded its coverage from Beijing to an unprecedented 3,600 hours, most of them through such outlets as online channels, digital platforms and on-demand footage. Such a flood of significant (and popular) content contributed in a major way to the rapid development of these new media platforms.

Ebersol unexpectedly resigned from NBC in May 2011, just weeks ahead of the negotiations for the U.S. rights for the 2014 and 2016 Olympic Games. Despite his departure, the network secured exclusive U.S. Olympic TV rights through 2020 with a \$4.38 billion contract that includes four summer and winter games.

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to sports without paying additional rights fees. In addition, powerful sports entities can demand airing of league-produced shows. This began when the NBA forced former broadcast partner NBC to schedule *NBA Inside Stuff*, a youth-oriented feature magazine about the league, as a condition of its contract with the league. Similar programming and a variety of promotional spots are now standard in major sports television rights deals.

Soap Operas and Game Shows

Daytime programming (9 A.M. to 4 P.M.) has traditionally been one of the most lucrative dayparts for television networks. Its profit margin often challenges that of prime time because the cost per program in

daytime is substantially less. *The money needed to pay for one hour of prime-time drama will cover the costs of a week’s worth of daytime soap operas. Moreover, daytime profits help networks offset extraordinary program investments in other dayparts.* Because viewer loyalties are intense and developing successful new programs is difficult, the newer networks were reluctant to try to develop daytime programming—which turned out to be smart. Cost advantages have greatly declined in the last few years because the audience for network daytime programming has succumbed to the lure of popular syndicated offerings on stations, cable and online.

Currently, of the major English-language networks, only ABC, CBS and NBC have a substantial stake in daytime programs Monday through Friday (see 7.4), although each of the Big Three have much

7.4 Network Weekday Daytime Programming

Network	Hours	Programs
ABC	4	<i>The View</i> , <i>General Hospital</i> , <i>The Chew</i> , <i>The Revolution</i>
CBS	5	<i>The Price Is Right</i> , <i>The Young and the Restless</i> , <i>The Bold and the Beautiful</i> , <i>The Talk</i> , <i>Let's Make a Deal</i>
NBC*	3	<i>Today</i> (3 rd and 4 th hours), <i>Days of Our Lives</i>

*NBC's *Today* has expanded into this daypart in the last decade, first from 9–10 A.M. ET in 2000 and from 10–11 A.M. ET in 2007. The fourth hour of *Today* is an example of how the concept of *brand extension* has come to television. This last hour is related to the parent program only by title as it has completely different hosts (Kathy Lee Gifford and Hoda Kotb), little if any interest in news, and much more emphasis on entertainment, comedy, fashion and food. Because of these differences, this particular brand extension of the iconic *Today* brand is aired out of pattern (usually in early afternoon) in some major markets.

reduced the amount of programming they schedule in this daypart in the last decade. Telemundo and Univision, however, maintain a major presence in daytime with telenovelas that air during several hours of their Monday through Friday schedules.

In addition to having lower programming costs in the daytime, the networks schedule about 21 minutes of non-program material (commercials, promos, public service announcements and so on) per hour compared with about 17 minutes in prime time. Although daytime audiences are much smaller than prime time, daytime programming fills more hours per day, and each hour provides more commercial slots. In prime time, top dramas, situation comedies and ambitious miniseries have enormous talent costs; sports programming has huge rights fees, and breaking news coverage is expensive. Those kinds of programs become loss leaders, often costing far more than the advertising revenue they generate.

But daytime programmers face enormous competition from cable television and syndicated programming. The collective number of viewers for syndicated programming, for example, now regularly surpasses that for daytime television on the major networks.

Daytime television seems to have the most potential for audience erosion. Compared with the 1950s and 1960s, the number of viewers who are at home in the daytime has decreased. Because many more women work, children stay at childcare centers rather than at home. The networks have

additional worries as the numbers of younger viewers (aged 18 to 34 and 18 to 49) continue to decline for each of the networks. Cable/satellite networks, the internet, video games and home video also contribute to this decline.

Soap Operas

For about 50 years, soap operas were the cash cows for their networks. Production and talent costs are considerably less than for prime-time programming. Soaps are shot primarily in digital studios with multiple cameras and receive far less costly postproduction editing and sound “sweetening.” Typically, the producers, directors, writers and actors hired for soaps produce five hours of programming a week, compared producing the 30 minutes of a prime-time sitcom. Despite the seemingly lower quality, CBS's highly rated *The Young and the Restless* does better at making a profit and delivering its target audience—women 18 to 49—than many of the network's prime-time offerings (see 7.5).

In addition, the soaps built loyal constituencies that lasted for decades because viewers followed a set of compelling characters nearly every weekday. Networks developed this habitual viewing by stripping daytime soaps in the same time slot five days a week. Viewers become so determined to see their favorite soaps that daily activities are planned around making time to watch, and episodes are regularly *time-shifted* when necessary. *Soap operas continue to be one of the most time-shifted programming genres.*

7.5 Network Soap Opera Ratings

		HH Rating	W 18-49 Rating
CBS	<i>The Young and the Restless</i>	3.6	1.7
CBS	<i>The Bold and the Beautiful</i>	2.2	1.0
ABC	<i>General Hospital</i>	2.1	1.4
NBC	<i>Days of Our Lives</i>	2.0	1.2
ABC	<i>One Life to Live*</i>	1.9	1.0
NBC	<i>All My Children*</i>	1.9	0.9

*Cancelled in 2011.

"Ratings: Another New Low for GH in Women 18-49," (2011, May 12), Soap Opera Network, <http://www.soapoperanetwork.com/ratings/item/4567-ratings-another-new-low-for-gh-in-women-18-49-viewers>.

Despite this long and enormously successful history, *the most important recent change in network daytime programming is the decline of the soap opera as a major genre*. Since 2010, four long-running soaps—*All My Children*, *As the World Turns*, *The Guiding Light* and *One Life to Live*—have been cancelled. This surprised many observers because soaps survived and even thrived after millions of women began to work outside the home in the 1970s and 1980s; they even found new popularity among college students and others who time-shifted them for viewing at more convenient times. Soaps fell from their perch as the prototypical daytime program genre for four reasons:

1. The total daytime audience has eroded greatly since the 1990s when even the lower-rated soaps were able to draw about five million viewers. Today, only the highest rated of the remaining soaps (*The Young and the Restless*) regularly attracts this many viewers.
2. The audience for soaps is ageing faster than that of other programs. The loyalty that made soaps such a successful genre has not transferred to younger viewers who can watch most anything they want on television at any time of the day via cable, time shifting and on demand programming.

3. Despite efforts to trim costs and with a price structure much less costly than prime-time dramas, soap operas still cost more to produce than talk and other "reality" programs.

4. Today's seemingly never-slowng pace of life makes it more and more difficult for viewers to devote the time and effort required to follow a program for five hours a week. Daytime viewing has become "grazing" in which viewers drop in and out of programs. This works to the advantage of relatively simple non-scripted programs such as magazines, reality and talk.

None of the problematic dimensions for soap operas are likely to change; this makes the remaining four network soaps likely to be the last of the English-language U.S.-produced soaps. This is a sea change from traditional television practice and another indicator of the big challenges that local, regional and national television programmers face.

Game Shows

From the 1950s until the 1990s, game shows were the other profitable mainstay of network daytime programming. Typically, several episodes of a game show were taped in a single day, and these shows used the same sets and props for years. In exchange for on-air announcements, advertisers provided the prizes awarded to contestants. Usually only the host got a big salary, and production costs were very low.

Four kinds of competition have nearly driven games daytime network lineups:

1. The popularity of familiar first-run syndicated game shows (including *Jeopardy!* and *Wheel of Fortune*)
2. The growth of cable/satellite networks dedicating some or all of their schedules to games (GSN, formerly the Game Show Network)
3. The draw of network big-money games (*Deal or No Deal* and *Who Wants to Be a Millionaire?*) in prime time
4. The rise of syndicated talk programming

This last, syndicated talk, is much more lucrative for most stations than network game shows. Remember

that stations get only network compensation and limited advertising slots for a network show, whereas they can sell all the advertising time in syndicated shows. They have particularly hurt the clearance rate for game shows—which has led to their virtual demise as a network daytime staple.

Two network daytime game shows remain, however, both on CBS: *The Price Is Right* and *Let's Make a Deal*. One of television's all-time longest-running programs, *Price* was the first hour-long game show (it was even 90 minutes for a short time), and developed a near-cult following among homemakers, shift workers and college students. Its network run still seems secure as the program has also developed a devoted following among young people, and host Drew Carey is popular with younger viewers, as well as with more traditional daytime audiences. The continuing success of *Price* led CBS to revive *Let's Make a Deal*, a game that has been on and off network and syndication daytime and primetime schedules since the 1960s. The newest version, hosted by Wayne Brady, places much more emphasis on the show business talents of its host than the older versions and shows signs of becoming a daytime staple (until the next major upheaval).

Weekday News, Information, and Talk

In addition to their own intense competition, the broadcast networks face increasing challenges from strong local stations in major markets in the early morning daypart. Local stations in large markets, including New York, Miami, Chicago and Washington, are producing their own early newscasts and magazine programs (see Chapter 8). Because of their strong local emphases, these competing shows have garnered strong ratings against network offerings.

If network programs are to remain strong competitors in the major markets in the morning dayparts, they must adjust to the changing environment by doing what local competitors cannot. Because network morning shows cannot compete for *local* appeal, the

key to successfully attracting mega-audiences lies in continuing to interview the most important national and international news and entertainment figures, and in shipping their popular morning personalities off to exotic locales or the sites of hot national news events.

Early-Morning Newscasts

Each of the Big Three provide early-morning newscasts on weekdays, running from 4 or 5 A.M. to 7 A.M. The networks hope to bolster their 7 A.M. programming by getting flow-through from these earlier programs, but they also realize that many affiliates produce their own morning news shows during part of this time period. Therefore, they try to accommodate affiliates with multiple feeds of these early newscasts. All have beginning and end points at the top and bottom of every half hour, so an affiliate can “dump out” or join a network morning newscast after 30 or 60 minutes.

Morning Magazines

In the period between 7 and 9 A.M., the Big Three networks compete head-to-head with magazine format programs. The long-running *Today*, *Good Morning America* and a CBS challenger appearing under numerous titles (*The Early Show* since 1999), have contested this time period for several decades. These morning magazines provide news headlines, weather forecasts, and interviews ranging from soft entertainment to hard news. Because they resemble print publications, they are called *magazines*. Like print magazines, they contain a series of feature articles, have a table of contents (*billboard*) at the beginning to tell viewers about what will be on that day, and are bound together with a common cover and title.

The magazine format is especially suited to the early-morning daypart when most viewers do not watch for extended periods of time. As people ready themselves for the day ahead, they catch short glimpses of television (see Chapter 8 on *dayparting*). The segmented magazine format allows viewers to watch for short periods of time and still see complete stories. News and weather updates

allow viewers to start their day with useful information. All national magazines include local breaks in which affiliates air brief local news, local weather or traffic updates. FOX affiliates usually compete with other affiliates by having their own long-form local newscasts (but nothing from the network).

Morning magazines are a valuable tool for promoting the network's prime-time offerings. For instance, when a network has scheduled a prime-time miniseries, the hosts of the morning magazine interview the stars or appear on the set of the miniseries. Correspondents from prime-time news magazines (*20/20*, *Dateline*) frequently make guest appearances on their network's morning shows to promote features on that night's program. Conversely, prime-time programs can help boost the ratings of morning magazines. For example, CBS's *The Early Show*'s ratings increased for a time when it began to capitalize on the success of the network's prime-time *Survivor* series. Each of the morning magazines has weekend editions that further extend their brands.

By early 2011, NBC News's *Today* was still dominating the ratings over its rivals—as it had done for over a decade. ABC News's *Good Morning America* was second, and CBS's *The Early Show* was a weak third and likely facing yet another revision (see 7.6 for more on the battle for morning magazine leadership). To some extent, the relative popularity of the leading morning shows is connected to the night-before ratings (*tuning inertia*). If NBC is the number-one network, the television set is often switched off at night with the channel position on NBC, and a disproportionate number of viewers turn on their sets and see morning programming from NBC. Similarly, ABC has an advantage when its shows win the ratings the night before. Despite presently out-rating its two traditional network rivals overall, CBS has never had much success in the morning and probably does not benefit from tuning inertia. Of course, NBC's strong late-night lineup helps *Today* much more than its presently low-rated prime-time lineup.

Despite relatively low ratings, the competition between the networks for early-morning viewers is always intense because the advertising revenue is so

great. The stakes get even higher during ratings sweeps. To make the shows more attractive, the cast and crew often travel to exotic locations during a sweep. Although the cost of remote productions is higher, they often return higher ratings and create a promotional hook to tempt audiences. During one sweeps period, CBS scheduled an entire week of its morning magazine inside the studios of *Late Night with David Letterman* while *Late Night* was in London. This provided cross-promotion for both shows.

Daytime Talk

Traditionally, the talk show was used to fill hour-long gaps in a network's daytime schedule and target the desirable 25 to 54 female audience. Further, if a talk-show host connected with the audience, a series attracted very loyal followers who watched daily. With studios and equipment almost always available, talk shows are one of the most easily instituted and adaptable of genres. Indeed, with outstanding success, syndicators have stolen the genre away from the broadcast networks with such syndicated talk as *Oprah*, *Dr. Phil*, *The Jerry Springer Show* and *The Ellen DeGeneres Show*. Back in the 1980s when *Donahue*, *Oprah* and *Geraldo* were redefining the daytime talk show, the networks stuck with their successful soap operas and game shows in daytime, losing the programming initiative to their syndicated competitors. In the era of corporate consolidation, some of these programs began being syndicated by the same media conglomerates that owned the networks.

The Big Three have recently re-entered the daytime talk business. This is a reaction to the decline of soap operas as a viable format and the inexpensive cost of mounting a talk show. ABC started the new wave of network daytime talk with *The View* in the late 1990s. The late-morning show (11 A.M. currently) has a unique four-host format that includes television icon Barbara Walters, its creator and producer. *The View*'s continuing success in both ratings and in its format expansion to international markets, led NBC to expand *Today* to both the 9–10 A.M. and 10–11 A.M. time periods. As mentioned above, the third and, especially, the fourth

7.6 The Morning Magazine Shows

NBC's *Today*

NBC pioneered the magazine format with the 1952 premiere of *The Today Show*. Over the years viewers have become very attached to the show's hosts and regular guests. Popular *Today Show* personalities have included Dave Garroway (its original host), John Chancellor, Hugh Downs, Barbara Walters, Tom Brokaw, Jane Pauley, Willard Scott, Bryant Gumbel, Katie Couric, Matt Lauer and Meredith Vieira.

Each of these hosts and regulars had a long run, bringing stability and familiarity to the program. These are essential ingredients for ratings success in a daypart where viewers' behavior becomes routine, as most people start each of their weekdays in much the same manner. *The Today Show's* sole big ratings dip, which took place in the early 1990s, has been attributed mostly to revolving hosts following the departure of Jane Pauley. *The Today Show* successfully rebounded in the mid-1990s with a new generation of morning stars and, renamed *Today*, has been the clear leader in morning network ratings. Lauer and Ann Curry are the present hosts/anchors for the first two hours, supported by a roster of familiar specialists such as weatherman Al Roker and big-name contributors from the NBC News.

ABC's *Good Morning America*

Like the newer networks of today, in its first decade or so (prior to 1975) ABC did not offer any network service until 11 A.M. Then it challenged the well-established *Today Show* by introducing *AM America* and aiming for a younger early-morning audience. ABC believed that its target audience, women 18 to 49, were less-habituated viewers than the over-50 age group that had been drawn in large numbers to *The Today Show*, and that these younger women would sample the new program. By 1980 the retitled *Good Morning America* (GMA) had moved into first place overall in the ratings.

Although *Today* had re-established its first-place position by the mid-1990s, GMA remains securely in second place. After unsuccessfully experimenting with younger, supposedly "hipper" anchors in the late 1990s and early 2000s following the departure of long-time anchors/hosts Charles Gibson and Joan Lunden, ABC returned Gibson and added popular prime-time news personality Diane Sawyer. When Gibson became the *World News* anchor in 2006, newscaster Robin Roberts was promoted to co-host, making Sawyer and Roberts the first all-female

morning magazine program hosting team. The network also invested millions in a new studio, complete with *Today*-like windows showing adoring fans outside.

Increasing stability has closed some of the ratings gap between number-two-rated GMA and number-one-rated *Today*. Sawyer replaced Gibson on the nightly ABC *World News* evening broadcast in 2010 at which point George Stephanopoulos joined Roberts as co-anchor.

CBS's *The Early Show*

CBS has languished in third place in the morning news ratings since the beginning of three-network competition in early mornings in the 1970s. Even when ABC was out of the picture, CBS always ran a dismal second to *The Today Show* regardless of whether they were trying straight news or "infotainment." The failure of CBS to establish a morning franchise is one of the enduring mysteries of network television. The network has always trailed the competition regardless of format, personalities or ratings for the rest of its morning performance. A recent CBS attempt at a star-driven *Today*/GMA-style program (complete with a window for fans to gather!) was *The Early Show* hosted by former *Today* host Bryant Gumbel. Debuting in late 1999, Gumbel (and co-host Jane Clayson) lasted barely three years before being replaced by four co-anchors—including Harry Smith, a veteran of a previously unsuccessful CBS attempt at developing a morning program. As of early 2011, Erica Hill and Chris Wrigg were the two main anchors, but they had a very brief tryout. By late in 2011, CBS had acquired former PBS talk host Charlie Rose and OVN host Gayle King for its morning show. These two will probably last longer than most CBS morning predecessors if only because it would take a good offer (and strong contract) to get them away from their own long-lasting shows. But if history is any guide, their time in these jobs will also be limited.

The money that successful morning programs generate makes it unlikely that CBS will give up on its nearly 40-year effort to create a successful morning news and infotainment magazine. Nonetheless, the huge number of options for viewers even at this time of the day on broadcast, cable and the internet make for increasingly long odds that CBS can capture enough of the audience and buzz to compete strongly with NBC and ABC in the early-morning ratings race.

hour of *Today* have minimal connection with the parent program.

More recently, CBS has rolled out *The Talk*, a program that follows the same basic pattern as *The View*. In addition to the traditional Big Three, both Telemundo and Univision rely on popular talk shows to fill substantial parts of their daytime schedules.

Evening News

Although ratings have and continue to decline, particularly among the young, the evening newscasts remain the centerpieces of the ABC, CBS and NBC television news organizations, and the same is true of Univision. Along with daytime and late-night programming, evening newscasts help distinguish these full-service networks from their more recent competitors (FOX, the CW, MNTV, ION), thus enhancing their brand identification.

The advertising revenue generated by these news programs remains substantial. Evening newscasts also give the broadcast networks prestige as major players in national and international politics. In the early days, evening newscasts provided a service to affiliates, most of which then had very limited, if any, news operations. CBS and NBC introduced the nightly 15-minute newscast to network television in 1948, and by the 1960s, the newscasts had expanded to 30 minutes. Although modest by today's standards, the expenses incurred by a network news operation during those early years were often far more than the income derived from advertising on the newscasts.

Today, evening newscasts face difficult competition from cable news networks and internet news services. Busy viewers don't need to wait until 6:30 or 7 P.M. for a network newscast because 24-hour news channels (CNN, CNBC, CNN Headline News, MSNBC and Fox News Channel) and hundreds, maybe thousands, of news websites sponsored by newspapers, television and radio stations, wire services and the networks themselves, can be reached anytime. In addition, the newscasts on the larger local affiliates compete with the network newscasts for national and sometimes international

stories using satellites to bring in high-quality coverage with on-the-spot video.

Thus, *network news may not remain a staple of non-prime-time programming if current trends persist* (see 7.7). Less than a third of the adult public now watch any of these telecasts with any degree of regularity, down from more than half in 1990 and almost three-quarters in 1980. Also, network, local and cable news audiences slipped precipitously in viewers younger than 30, perhaps because younger adults are more likely to seek news from other alternatives, such as the internet and mobile media. This demographic trend suggests that audiences for evening newscasts may continue to decline.

Nonetheless, network newscasts continue to bring in sizable advertising revenue for the networks. Despite increased competition and lower ratings, these newscasts also remain important as promotional tools. Affiliates benefit because the networks promote the evening's prime-time schedule during commercial breaks. Just as with early-morning magazine programs, the network's news division can promote other news programming within the newscast. For example, ABC promotes *Nightline* as well as its website (*abc.com*) within its nightly newscast, while each of the networks generally incorporates promotion for their own news magazines (CBS's *60 Minutes* and *48 Hours Mystery*; NBC's *Dateline NBC*; and ABC's *20/20* and *Prime Time Live*) within their evening newscasts. Indeed, all the networks push their websites in every newscast and many promotional spots.

Time zone differences present a challenge to both programming departments and the news departments. The solution has been a multiple-feed schedule. The first feed of a network newscast is generally 6:30 to 7 P.M. eastern time. Because some affiliates delay this newscast and the time would be inappropriate for the mountain and Pacific time zones, a second feed is scheduled for 7 to 7:30 P.M. eastern time and a third from 6 to 6:30 P.M. Pacific time. Breaking or updated news stories can be inserted into the later feeds.

Because most network newscast elements (news gathering, scheduling and technology) are about the same across competitors, *news personalities become*

7.7 The Evening Newscasts

NBC *Nightly News*

NBC first offered a regular nightly newscast in 1948, the *Camel News Caravan* with John Cameron Swayze. Swayze was not an experienced journalist and eventually was replaced in 1956 by Chet Huntley and David Brinkley. The renamed newscast, *The Huntley-Brinkley Report*, was a ratings hit, becoming the top-rated news program in the late 1950s and for most of the 1960s. When Huntley retired in 1970, NBC retitled the show the *NBC Nightly News* with Brinkley and John Chancellor as the main anchors. Following NBC's declining news ratings in the late 1970s and early 1980s, Tom Brokaw was moved from *The Today Show* to the *Nightly News* anchor position in 1982. As NBC added cable networks (CNBC, MSNBC), the *Nightly News* became a source of programming material for these newer news/talk outlets. *Nightly News*'s stories are frequently the major focus of evening programming on these cable networks, and archived *Nightly News* reports have been repackaged to provide new programming for its cable partners.

Brokaw stepped down as *Nightly News* anchor after the 2004 presidential election and was successfully replaced by Brian Williams, a frequent guest anchor on the *Nightly News* and former anchor of a long-running CNBC evening newscast. Heir to ABC's Peter Jennings because of his similar wry manner, NBC's Williams is currently the most popular of the network evening newscasters.

CBS *Evening News*

Walter Cronkite replaced Douglas Edwards as anchor of the *CBS Evening News* in 1962 and remained until his retirement in 1981. In times of crisis, more people tuned in to Cronkite than to any other newscaster. During the 1970s, polls repeatedly showed Cronkite as the most trusted source of news. Dan Rather took over the helm of the *CBS Evening News* upon Cronkite's retirement, but Rather's credentials as a highly experienced journalist would have meant little had his chemistry not matched that of his predecessor.

Even though the ratings of the *CBS Evening News* declined after Cronkite's retirement, Rather continued to dominate the evening news ratings until the late 1980s when the reign of ABC's Peter Jennings began. In June 1993 CBS decided to pair Rather with veteran reporter and weekend anchor Connie Chung. The combination did not work out, and ratings did not improve. Two years later, Chung was demoted from the

anchor desk, and the president of CBS News was fired. In 2005, Dan Rather stepped down following criticism of his role in a news story that used faked documents.

Long-time CBS correspondent Bob Schieffer was interim anchor until September 2006 when Katie Couric (former co-host of NBC's *Today*) became the sole weeknight anchor. Although Couric and her producers attempted to shake up the conventional formula of an evening newscast with more interviews and guest commentators, such moves were met with large amounts of criticism and no improvement in the ratings. The newscast soon reverted to the standard anchor-centered newscast that has been a television mainstay for over 50 years. After five years of not being able to lift the newscast out of third place, Couric left in 2011 to be replaced by veteran CBS correspondent Scott Pelley.

ABC *World News*

ABC has been airing nightly newscasts since 1953, but for three decades it failed to pose a serious news threat to CBS and NBC. In 1977, in a bold move, ABC appointed the head of ABC Sports, Roone Arledge, to supervise its news division as well as its sports division. Arledge had made ABC the number-one network sports organization with his unconventional strategies—introducing offbeat sporting events and building up the dramatic aspects of sports competition. During his tenure as head of news, ABC assembled a team of highly respected journalists, including Peter Jennings, Sam Donaldson, Diane Sawyer, Ted Koppel and David Brinkley, catapulting ABC into the lead in the evening news ratings for some years.

Most observers credit anchorperson Peter Jennings with the success of *World News Tonight*, as he actively served as executive editor and wrote (or rewrote) many of the stories, adding his own wry style. After the departures of Brokaw and Rather, Jennings' 2005 death was a shock to many viewers and industry insiders, closing an era of network news stability, now called the classic era. After an interim period, Elizabeth Vargas and Bob Woodruff were named as Jennings' successors in 2006. However, Woodruff's grievous injuries suffered while he was covering the Iraq war put an end to the new anchor team after less than one month. Charles Gibson became the anchor of the renamed *ABC World News* later that year. Diane Sawyer became the second woman to solo anchor a network evening newscast when she replaced the retiring Gibson in 2010.

critical for winning the ratings competition. News anchors that can connect with other members of the news team and the audience are essential as the centerpieces for building loyalty. All three networks produce high-quality newscasts for which the ratings have been nearly equal for a very long time, but they risk losing the next generation of news viewers to cable and the internet if younger personalities are not developed to anchor these programs. Prime-time newsbreaks, vacation replacements and weekend newscasts often are the training grounds for new anchors and reporters.

As of the end of 2010, the *NBC Nightly News* was solidly in first place in the evening news ratings with an Adults 25 to 54 rating of 2.0. *ABC World News* was second with 1.7, followed by the *CBS Evening News* with 1.4. The networks have tried to distinguish the three newscasts from each other and from cable by creating segments within the newscasts. CBS's "Eye on America," NBC's "It's Your Money," and ABC's ongoing "Person of the Week" provide hooks for promotional announcements. The networks believe that viewers will link such segments to a particular network and get into the habit of watching a particular network for a favorite segment. Alternately, they may follow up on that network's news website. The news websites also offer viewers a chance to view features or even full newscasts on demand, although with reduced picture and sound quality.

Late-Night News

In November 1979, ABC News seized on the American viewing audience's fascination with the Iran hostage crisis and began a late-night newscast to summarize the major events of the day. The show evolved into *Nightline*, an in-depth news program hosted by Ted Koppel until 2005. Then a three-anchor multi-topic format was developed, currently hosted by Cynthia McFadden, Terry Moran and Bill Weir. Critics, however, pointed to less depth than in the single-story format and frowned on the rise in popular culture stories.

Because it counterprograms the network and syndicated talk shows, *Nightline* continues to draw

a loyal, upscale audience. Traditionally, the series' ratings fell or rose sharply depending on national crises, wars and other disasters. Although the program is typically a half-hour in length, it sometimes expands for extremely important stories. On those evenings, *Nightline* can obliterate all the competing programs.

Such major news events as the disputed 2000 presidential election, the events of 9/11, the invasion of Iraq and later the Arab Spring triggered big upward spikes in the size of its audience. Even when major events are not taking place, *Nightline* has become a solid ratings performer (often finishing first in its time slot). *The key to its success has been ABC's vigorous campaign to have the show cleared live in most TV markets.*

Overnight News

The overnight time period (2:05 to 6 A.M.) has the lowest viewership of any daypart. Be it second-shift workers, nursing mothers, bottle-feeding fathers or insomniacs, however, there is *some* television viewing in the overnight period, but the network competition is not as spirited as in other dayparts. Unlike in prime time, where HUT levels are around 60 percent, overnight HUT levels are just 10 percent. Given the relatively low number of viewers, the potential ratings for individual overnight programs are thus quite low. Some affiliated stations sign off in the overnight hours, leading to lower clearance rates that further reduce ratings. Therefore, in the overnight time period, a 1.0 rating (meaning over 3 million people) is considered very strong (even in a nation of over 300 million people).

Given the low ratings and the low HUT levels, one might wonder why a network would bother to schedule any programming overnight. Even with 16 minutes of commercial time per hour, the entire daypart is worth only a few million dollars to each broadcast network. If the network can keep costs below the advertising revenue in the daypart and promote forthcoming shows, however, the effort is worthwhile because the risk is low. In addition, overnight news gives network affiliates programming at no cost to sustain their broadcast signal for 24 hours a day.